

# Customer Services Guide



## Services for Microsoft Dynamics®

Version 11

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This Customer Services Guide ("Guide") is a supplement to your [Agreement for Microsoft Services \("Agreement"\)](#). This Guide is incorporated by reference into the Agreement. You agreed to abide by the terms of this Guide when you agreed to the terms of the Agreement. This Guide describes the customer support services available for products purchased from the Microsoft Dynamics Price List.

The services are offered under several options, including: Business Ready Enhancement Plan, Business Ready Advantage Plan, and Business Ready Advantage Plus Plan. Some of these plans may not be available globally. Check with your partner for local availability for your solution.

This Guide describes the benefits you are entitled to through your Microsoft Dynamics service plan. If you choose to terminate your Microsoft Dynamics Service Plan, you must notify your Microsoft Dynamics partner at least 90 days before your renewal date. If you allow your contract to lapse, you will immediately lose access to the benefits described for the plan you've chosen.

All of the Service Plans listed below include access to the following benefits:

CustomerSource: During the term of your service plan you will have access to a customer website that contains personalized Microsoft product and service information, a searchable technical database, downloads documentation, discussion boards, unlimited online training, news and other features. CustomerSource is available in multiple languages and local country sites. Customers can log in to CustomerSource at <https://mbs.microsoft.com/customersource>.

Knowledge Base: use this tool to find answers to the most common Microsoft product questions, including troubleshooting steps, solutions to common issues, and how-to articles.

Unlimited Online Training: these benefits are globally available for customers with CustomerSource access.

- *E-Learning:* Unlimited access to this content includes courses dedicated to Microsoft Dynamics solutions on specific topic areas, e.g. a product module. Knowledge acquired is comparable to classroom training.
- *Training Materials:* Courseware content can be downloaded and used as a study tool or as a desktop reference.
- *Learning Plans:* Use these plans as a training roadmap for your users. It details the training and certification options available for each module or specific functionality.
- **Please note: Some training content is available in multiple languages.**

**Business Ready Enhancement Plan** - The Business Ready Enhancement Plan (BREP) is available for customers who have purchased licenses for:

- Microsoft Dynamics® AX
- Microsoft Dynamics® CRM
- Microsoft Dynamics® GP
- Microsoft Dynamics® NAV
- Microsoft Dynamics® Point of Sale (POS)
- Microsoft Dynamics® Retail Management System (RMS)
- Microsoft Dynamics® SL
- Microsoft C5 (Denmark only)

**Version Upgrades and Product Updates:** During the term of your BREP plan you are entitled to any upgrades and updates we release for your Microsoft Dynamics product. If you allow your BREP coverage to lapse, you will lose access to Microsoft Dynamics upgrades and updates.

#### ***Upgrade Note to Microsoft Dynamics AX 2012 – Business Value Licensing***

Upgrading to Microsoft Dynamics AX 2012 from a prior version of Microsoft Dynamics AX entails a transition that requires bridging two distinctive licensing models. Therefore, Microsoft offers to you two upgrade/transition options aimed at maintaining a balance between the value of your existing Business Ready Licensing or Module Based Licensing entitlements and the upgraded Microsoft Dynamics AX 2012 Business Value Licensing entitlements.

- **Credit -Based Product Version Upgrade/Transition** where customers will receive a credit for their existing license investment. This credit will be equivalent to 100% of their Protected List Price for the modules and users the customer has licensed on prior versions of Microsoft Dynamics AX.
- **Formula -Based Product Version Upgrade/Transition** where a set of upgrade/transition formulas define the number and type of users and servers the customer receives for Microsoft Dynamics AX 2012 in exchange for the number and types of users and functionality the customer had licensed for prior versions of Microsoft Dynamics AX before the upgrade/transition. Please contact your Microsoft Dynamics

partner to obtain a full description of the License Conversion Table for the Formula - Based Product Version Upgrade/Transition.

These two paths will be available to Microsoft Dynamics AX 2012 until further notice. However, customers need to meet the eligibility criteria for each path as outlined below.

**For existing Microsoft Dynamics AX customers as of prior to November 1, 2011:** both upgrade/transition paths will be made available.

**For new customers who purchased Microsoft Dynamics AX on or after November 1, 2011:** only the Credit- Based Product Version Upgrade/Transition is available.

**Service Packs and Hot Fixes:** Service packs and hot fixes are created and released at Microsoft's discretion for recognized issues identified for Microsoft products. Many hotfixes are frequently combined into a single package (called a service pack), which is made available to customers. Service packs are generally cumulative, meaning that each new service pack contains all the fixes that were included with previous service packs and any new critical security fixes.

During the term of your BREP coverage you will have access to any service packs and hot fixes we release for your Microsoft Dynamics product during the Mainstream Support Phase of the Microsoft lifecycle as long as your product is listed as a supported product on the Microsoft lifecycle website. The Microsoft lifecycle website is located at <http://www.support.microsoft.com/lifecycle>. Customers who wish to purchase a Custom Support or Extended Hot Fix Support agreement must be enrolled in a Business Ready Enhancement Plan.

**Tax and Regulatory Releases:** During the term of your BREP coverage, you will have access to tax and regulatory releases for the Microsoft Dynamics products that Microsoft makes generally commercially available. Updates for Microsoft Dynamics products that are supported by Microsoft are generally released each fiscal year or on an as-needed basis for software in the Mainstream Support Phase of its lifecycle. Local laws, market conditions and technical support requirements differ around the world, and thus may necessitate out of cycle releases.

**Protected List Price:** if you remain current on your BREP coverage, the recommended system list price at the time you purchase a license for a Microsoft Dynamics product will serve as the basis on which we calculate future Business Ready Enhancement Plan re-enrollment fees. Your partner will set your final price and will establish any payment terms and conditions with you. See your partner for details.

Product Line and Edition transitions will require a BREP plan re-calculation, based on the recommended system list price of the new license.



**Unsupported Products:** During the term of your BREP coverage you may choose to purchase licenses off the latest available price list and downgrade your Microsoft Dynamics product to unsupported versions that we make available at our sole discretion. However, by definition, Microsoft will not support versions that have fallen outside the product lifecycle dates. You will not be entitled to any new upgrades, updates, service packs, hot fixes, or tax and regulatory releases for these unsupported Microsoft Dynamics products. For a list of Microsoft Dynamics products that are currently supported, go to the Support Lifecycle Web site at <http://support.microsoft.com/lifecycle>.

**Transition Investment Credits:** During the term of your Business Ready Enhancement Plan, customers can apply their license investment towards a:

- **Product Transition:** transition to any other Microsoft Dynamics solution, e.g. Microsoft Dynamics AX to Microsoft Dynamics NAV.
- **Edition Transition:** transition to another edition of the same product, e.g. Standard to Professional, Business Essentials to Advanced Management
- **License Model Transitions:** Any move from Module Based Licensing model to the Business Ready Licensing mode, remaining within the same product line. Transitioning between these two license models may require payment of an additional transition fee.

Please note: The transition investment credit does not apply to Microsoft Dynamics CRM.

In addition, when you use problem resolution support for any Microsoft Dynamics product, your customer support case history may track all incidents received and their resolution. In order to improve the services Microsoft and your Microsoft Dynamics implementation services partner provide, this history will be visible to your partner of record.

### **Localizations**

Microsoft extends the business process functionality of its Microsoft Dynamics enterprise resource planning applications by developing features to address certain language or nationwide financial regulatory requirements in countries where Microsoft makes these applications generally commercially available.

Since laws and regulations that affect companies are different in each country, the Microsoft Dynamics applications are not supported in terms of localizations, languages or technical support in all countries. For more information about the various countries and regions where Microsoft makes locations and or translations generally commercially available for Microsoft Dynamics applications click [here](#).

**Business Ready Advantage Plan** - The Business Ready Advantage Plan (BRAP) is available for customers who have purchased licenses for:

- Microsoft Dynamics® CRM
- Microsoft Dynamics® GP



- Microsoft Dynamics® Point of Sale (POS)
- Microsoft Dynamics® Retail Management System (RMS)
- Microsoft Dynamics® SL

Check with your partner for local availability for your solution.

If you are on the BRAP plan, you receive all of the benefits mentioned above for BREP, plus:

**Six Annual Problem Resolution Support Incidents:** During the term of your BRAP coverage, you are entitled to six Microsoft Dynamics electronic support incidents (via CustomerSource) per year. Problem resolution support incidents have an estimated response time of three business hours from our receipt of your request so long as the applicable product is listed as a supported product on the Microsoft lifecycle website. Support hours are 8 am – 8 pm CST Monday – Friday.

Support incidents should be used for problems with specific symptoms encountered while using Microsoft Dynamics products, where there is a reasonable expectation that the problems are caused your Microsoft Dynamics product. Support incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as intended. An incident is defined as a single support issue and the reasonable effort needed to resolve it. A single support issue is a problem that cannot be broken down into subordinate issues. If a problem consists of subordinate issues, each shall be considered a separate incident. Support incidents cannot be used for general advice and guidance. Advisory services can be purchased as an additional billable service.

You are responsible for implementing the procedures necessary to safeguard the integrity and security of your software and data and to reconstruct lost or altered files resulting from failures.

**Managed Community and Support Forums:** Exchange ideas, ask questions and discuss solutions with your peers. Take advantage of the Microsoft Dynamics Community, helping you get answers to your questions. You will also have access to forums monitored by Microsoft Support Engineers. [Go here to access the Dynamics Community.](#)

## **Business Ready Advantage Plus Plan**

The Business Ready Advantage Plus Plan (BRAP Plus) is available for customers who have purchased licenses for:

- Microsoft Dynamics® AX
- Microsoft Dynamics® CRM
- Microsoft Dynamics® GP
- Microsoft Dynamics® NAV
- Microsoft Dynamics® Point of Sale (POS)
- Microsoft Dynamics® Retail Management System (RMS)

- Microsoft Dynamics® SL

Check with your partner for local availability for your solution. For additional details on availability and options for Microsoft Dynamics AX and Microsoft Dynamics NAV, click [here](#).

If you are on the Business Ready Advantage Plus Plan, you receive all of the benefits mentioned above for BRAP, Plus:

**Unlimited Electronic Problem Resolution Support:** During the term of your BRAP Plus coverage, you receive unlimited Microsoft Dynamics electronic support incidents (via CustomerSource). Problem resolution support incidents have an estimated response time of two to eight business hours from our receipt of your request so long as the applicable product is listed as a supported product on the Microsoft lifecycle website. Response times will vary based on the severity of the issue. Severity level definitions are posted [here](#). Support hours are 8 am – 8 pm CST Monday – Friday. If a Severity A level case is encountered after the normal support hours listed above, customers will receive 24x7 telephone support.

Support incidents should be used for problems with specific symptoms encountered while using Microsoft Dynamics products, where there is a reasonable expectation that the problems are caused by your Microsoft Dynamics product. Support incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as intended. An incident is defined as a single support issue and the reasonable effort needed to resolve it. A single support issue is a problem that cannot be broken down into subordinate issues. If a problem consists of subordinate issues, each shall be considered a separate incident. Support incidents cannot be used for general advice and guidance. Advisory services can be purchased as an additional billable service.

You are responsible for implementing the procedures necessary to safeguard the integrity and security of your software and data and to reconstruct lost or altered files resulting from failures.

## Professional Plan

Available for Microsoft Dynamics CRM Online.

Please refer to <http://crm.dynamics.com> or your partner for local availability.

**Unlimited Electronic or Telephone Support Incidents:** During the term of your Professional Plan, you receive unlimited electronic or telephone support incidents with an estimated response time of eight business hours from our receipt of your request so long as the applicable product is listed as a supported product on the Microsoft lifecycle website. Support hours are 8 am – 8 pm CST Monday – Friday.

Support incidents can be used for problems with specific symptoms encountered while using Microsoft Dynamics products, where there is a reasonable expectation that the problems are caused by your Microsoft Dynamics product. Support incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as

intended. An incident is defined as a single support issue and the reasonable effort needed to resolve it. A single support issue is a problem that cannot be broken down into subordinate issues. If a problem consists of subordinate issues, each shall be considered a separate incident.

Support incidents cannot be used for general advice and guidance. Advisory services can be purchased as an additional billable service.

You are responsible for implementing the procedures necessary to safeguard the integrity and security of your software and data and to reconstruct lost or altered files resulting from failures.